

Senior Client Outreach & Education Strategist Stakeholder Relations

(Ontario Pension Board - <https://www.opb.ca>)

At OPB, the health, safety and wellness of our employees, clients, vendors, and stakeholders is our top priority. In accordance with the advice of applicable public health authorities, we have transitioned to work-from-home to mitigate the risk of the potential spread of COVID-19. To learn more about our hiring protocols during the COVID-19 pandemic, please visit our Careers site at <https://www.opb.ca/about-opb/careers>.

As a key member of the Stakeholder Relations team at Ontario Pension Board, the Senior Client Outreach and Education Strategist is responsible for leading strategic pension outreach and education initiatives. If you have experience creating and delivering engaging educational programming in a professional services environment and are passionate about financial literacy, this is a wonderful opportunity.

Key Responsibilities:

Reporting to the Director, Stakeholder Relations, this position leads the development, implementation, delivery and evaluation of OPB's client outreach and education strategies and initiatives to support OPB's Advise & Protect mission. You will create and continually evolve outreach and educational programs for members in all different stages of their careers to help increase their awareness of the value of the Public Service Pension Plan (PSPP), how it fits into their overall financial planning picture, and the importance of actively planning for retirement. Internally, you will lead collaboration with OPB's Client Service Advisors and other internal partners to develop and deliver educational content; sharing feedback, examining issues, concerns, and opportunities, and exploring and developing strategies to address them. You will monitor and analyze also work with Policy to understand emerging trends and legislative changes in the financial and pension industry to identify and their potential impacts on the PSPP and make recommendations for how to incorporate them effectively into how they may impact educational strategy and materials. Externally, you will work closely with stakeholders and employers to partner on education initiatives. You will also monitor industry best practices around financial education and adult learning and generate ideas and strategies to enhance programming and plans our education strategy and initiatives.

As a brand ambassador for OPB, you will establish, build, and maintain trusted relationships with clients and stakeholders. You will work closely with the Client Relations & Education Specialist to deliver engaging and customized education sessions on a variety of pension related topics for clients throughout the province. From these sessions, you will analyze feedback and identify trends and opportunities to address client needs and increase their engagement with retirement planning. On an ongoing basis, you will evaluate the overall success of client education strategies and identify trends and opportunities to help move them forward; generating new ideas, options and approaches for continuous advancement of OPB's Advise & Protect mission.

Key Qualifications:

- Knowledge of adult learning principles and demonstrated experience in the design, development, implementation and evaluation of client education methodologies and programs.
- Ability to think strategically and turn strategic objectives into educational materials, presentations, and solutions. Well-developed analytical skills to research, identify, and interpret trends, issues and risks
- Creative written communication skills to develop and prepare engaging educational materials and presentations.
- Commitment to continuous improvement and ability to think outside-the-box to implement creative and innovative educational programming. Ability to explore and lead forward-thinking educational initiatives, including the delivery of engaging online learning initiatives.
- Excellent verbal communication skills to deliver education sessions to client groups, explain technical pension concepts, and adjust presentation style to accommodate a variety of audiences with differing levels of understanding and familiarity with pensions and financial planning.
- Strong client focus and excellent interpersonal and client relationship management skills to establish and build trusted relationships with key stakeholders and act as an ambassador of OPB, including the ability to effectively diffuse difficult situations with tact and diplomacy.
- Ability to exercise sound judgement when addressing client questions and concerns and identifying situations where there are potential impacts, risks, and sensitivities and adjusting approach and content accordingly or flagging issues requiring escalation.
- Self-directed, with the ability to work collaboratively in a team, and with executives and internal partners.
- Strong organizational, time management and project leadership skills to work effectively in a fast paced, rapidly changing environment where managing multiple competing, time-sensitive priorities and being adaptable to change is essential.
- Commitment to continuous learning and professional development. Extensive knowledge of legislation, policies, and procedures governing the administration of the Public Service Pension Plan including the Pension Benefits Act, the Public Service Pension Act, the Income Tax Act, and the Family Law Act.
- Experience working in the financial services industry (e.g. pensions, banking, insurance) would be a strong asset. The Registered Retirement Consultant (RRC) designation is required, or equivalent retirement and/or financial planning certification; OPB is prepared to support the successful candidate in completion of the RRC.
- At this time, many learning engagements are being facilitated virtually. However, in the future this position may require extensive and regular travel across Ontario. This position requires the successful candidate to have a valid driver's license.

Please visit OPB's Career page to apply: <https://opb.talcura.com/candidates/home.aspx>

The competition will remain open until a successful candidate is selected or until the competition is closed.

OPB is committed to providing accommodation for people with disabilities in its recruitment process. Please advise OPB if you require an accommodation and we will work with you to meet your needs. Candidates being considered for this position will be required to submit to a background screening. We thank all applicants for their interest, however, only candidates selected for an interview will be contacted.